2021 SPECIAL REPORT:

THE NEW OUTDOOR PARTICIPANT

(COVID AND BEYOND)

OUTDOOR INDUSTRY ASSOCIATION

NAXION RESEARCH › CONSULTING

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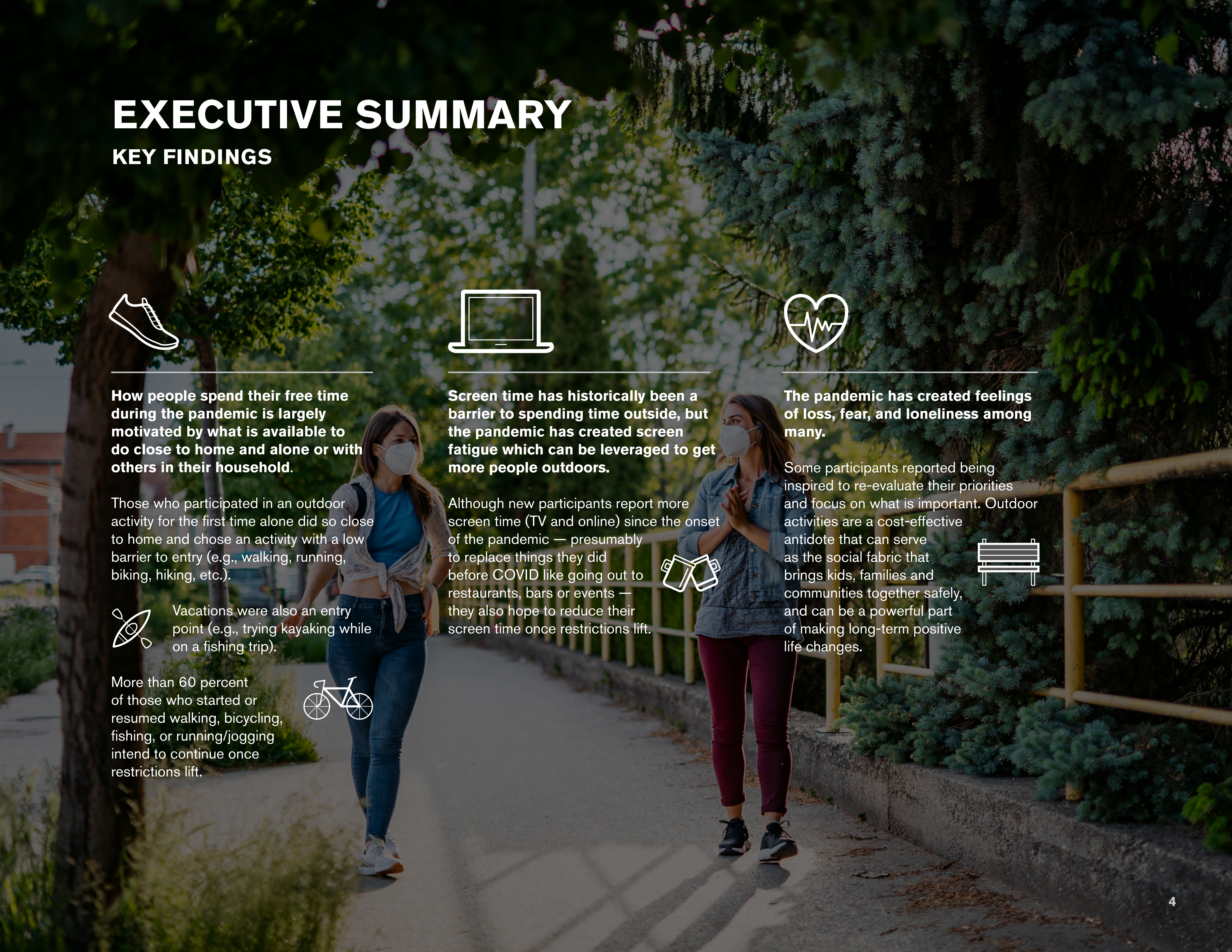
BACKGROUND AND OBJECTIVES

Amidst the COVID-19 pandemic restrictions, more Americans have turned to the outdoors, some for the first time and others for the first time in many years. These new outdoor participants represent an unprecedented opportunity to grow and diversify the outdoor community. But to capitalize on this opportunity, we need to better understand these participants.

To that end and in response to its members' requests, Outdoor Industry Association commissioned a one-time special report from research partner NAXION to answer four timely questions:

1. Who are these new outdoor participants demographically, psychologically, and behaviorally?
2. What were the barriers that kept them from engaging in the outdoors prior to the pandemic, and why are they choosing outdoor activities now?
3. As COVID-19 restrictions lift, how likely are these new participants to continue to engage in the outdoors?
4. And what can we do to increase retention?



EXECUTIVE SUMMARY

KEY FINDINGS

How people spend their free time during the pandemic is largely motivated by what is available to do close to home and alone or with others in their household.

Those who participated in an outdoor activity for the first time alone did so close to home and chose an activity with a low barrier to entry (e.g., walking, running, biking, hiking, etc.).

Vacations were also an entry point (e.g., trying kayaking while on a fishing trip).

More than 60 percent of those who started or resumed walking, bicycling, fishing, or running/jogging intend to continue once restrictions lift.

Screen time has historically been a barrier to spending time outside, but the pandemic has created screen fatigue which can be leveraged to get more people outdoors.

Although new participants report more screen time (TV and online) since the onset of the pandemic — presumably to replace things they did before COVID like going out to restaurants, bars or events — they also hope to reduce their screen time once restrictions lift.

The pandemic has created feelings of loss, fear, and loneliness among many.

Some participants reported being inspired to re-evaluate their priorities and focus on what is important. Outdoor activities are a cost-effective antidote that can serve as the social fabric that brings kids, families and communities together safely, and can be a powerful part of making long-term positive life changes.

THE PANDEMIC HAS ATTRACTED MORE DIVERSE OUTDOOR PARTICIPANTS, AND THERE IS AN OPPORTUNITY TO INCREASE THE DIVERSITY OF THE OUTDOOR PARTICIPANT BASE LONG TERM. COMPARED TO THOSE WHO PARTICIPATED IN OUTDOOR ACTIVITIES IN 2019, NEW PARTICIPANTS ARE:

MORE LIKELY TO BE FEMALE
58% vs. 49%

YOUNGER
average age is 45 vs. 54

SLIGHTLY MORE ETHNICALLY DIVERSE
66% white vs. 71%

MORE LIKELY TO LIVE IN URBAN AREAS
36% vs. 29%

IN A SLIGHTLY LOWER INCOME BRACKET
41% with income of $100K+ vs. 46%

The top reasons for starting an outdoor activity during the pandemic include getting exercise, staying healthy, and getting out of the house. Walking is the most commonly reported new outdoor activity. One-quarter of new participants report that they picked up running/jogging and/or bicycling. Birdwatching and fishing form a third tier of new or resumed activities.

ABOUT ONE-QUARTER OF NEW PARTICIPANTS SAY THEY DON'T WANT TO CONTINUE THEIR OUTDOOR ACTIVITIES. Among the few that aren't likely to continue their new outdoor activities, the top barriers include travel, resuming other activities, and family demands.

A lack of information about where to go, how to participate, and whom to participate with can be a barrier to trying new outdoor activities. Providing this kind of information could keep new participants engaged and attract others.

WHAT CAN WE DO TO IMPROVE RETENTION OF NEW PARTICIPANTS?

1

Create more outdoor recreation opportunities close to home.

- Parks and open areas near where people live are a crucial part of growing participation. The pandemic has shown that there is a demand for close-to-home outdoor recreation opportunities *(e.g., snowboard/skate/bike/paddle parks and nature centers).*

2

Help new participants make their activities more social as restrictions lift.

3

Develop programs and services with the specific goal of diversifying the participant base.

4

Develop strategies for encouraging people to start small *(e.g., walking, running, hiking, birdwatching).*

5

Position outdoor recreation as…

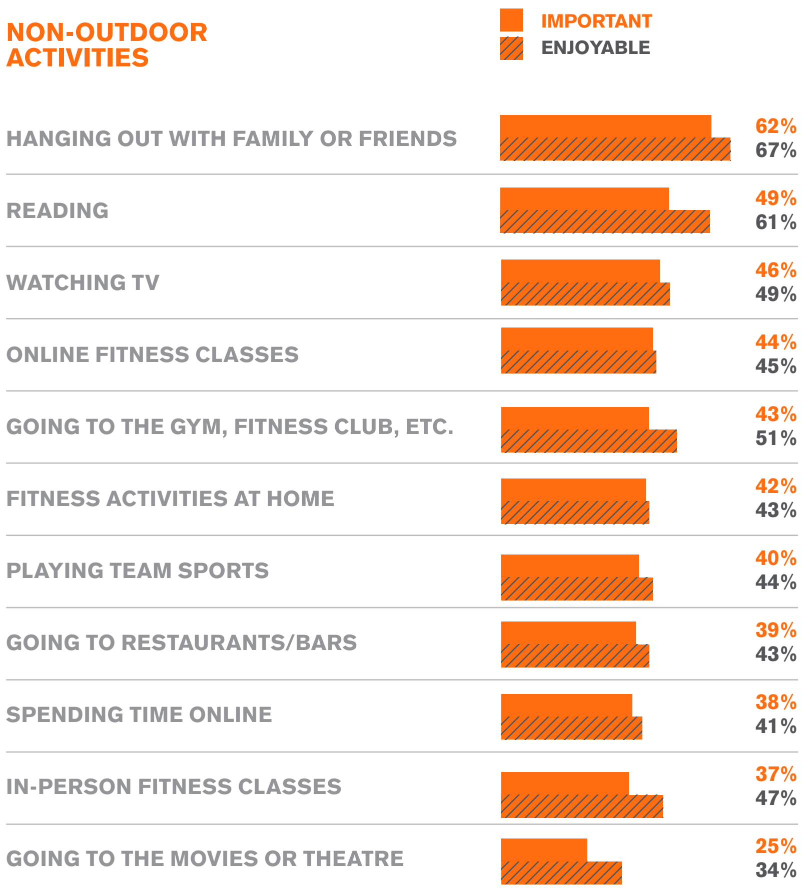
- An antidote to the mental health consequences of the pandemic.
- A way to get out from behind the screens that have dominated pandemic life.
- A method to maintain the focus on what is important in life.

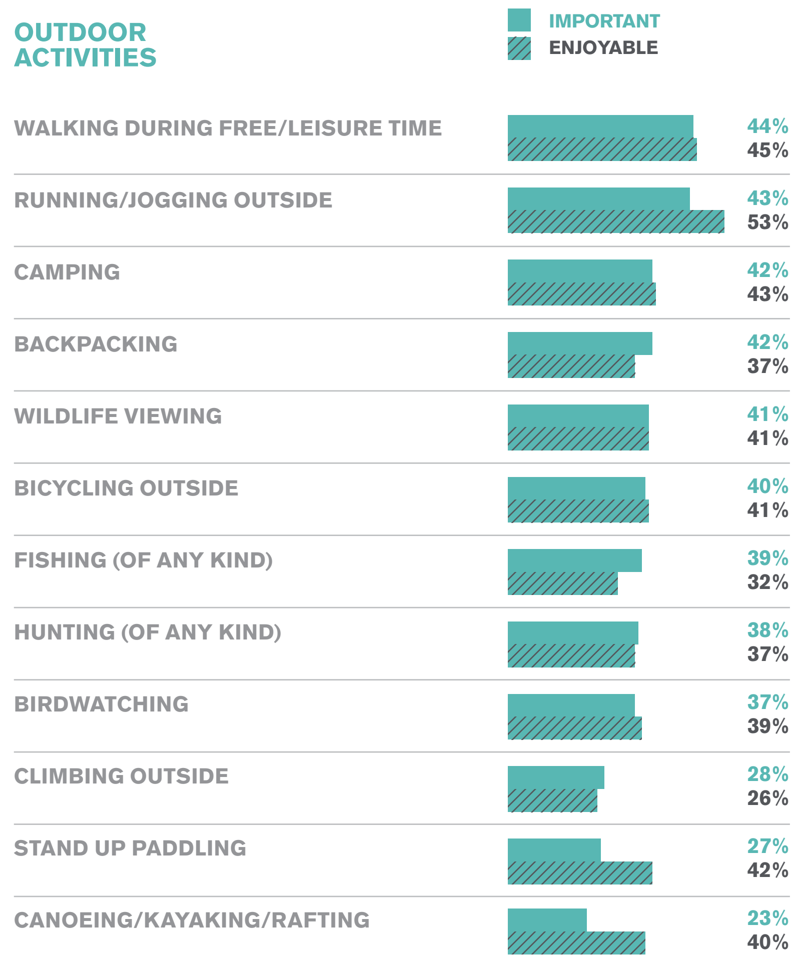
DETAILED FINDINGS

HOW MUCH DO NEW PARTICIPANTS VALUE THE FOLLOWING OUTDOOR AND NON-OUTDOOR ACTIVITIES DURING COVID?

KEY TAKEAWAY:
Spending time with family and friends is, by far, the most important and enjoyable non-outdoor activity among new participants.

OPPORTUNITY:
Positioning the outdoors as a safe and accessible way to spend time with friends and family could help retain new participants.





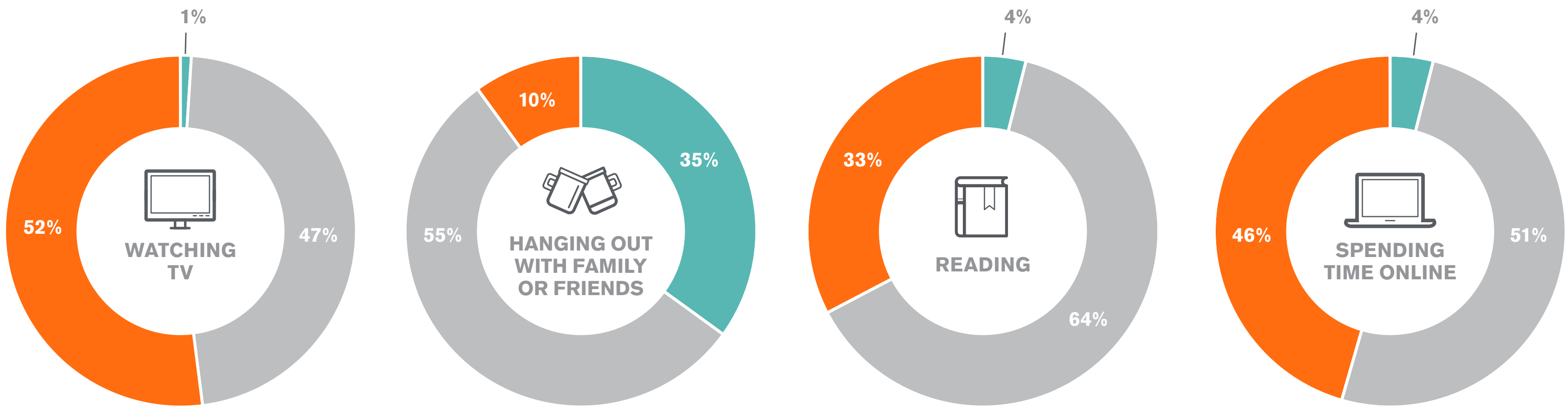
HOW HAS PARTICIPATION IN NON-OUTDOOR ACTIVITIES INCREASED OR DECREASED DURING COVID?

KEY TAKEAWAY:
New participants report that they are watching TV more often and spending more time online since the onset of the pandemic than before.

OPPORTUNITY:
Screen time has historically been a barrier to spending time outside, but the pandemic has created screen fatigue which can be leveraged to get more people outdoors.

PERCENT REPORTING CHANGE IN FREQUENCY SINCE THE START OF THE PANDEMIC (MARCH 2020)

LESS OFTEN   SAME   MORE OFTEN



THE PERCENTAGE OF NEW PARTICIPANTS SAY THEY'LL RETURN TO THEIR PRE-PANDEMIC FREQUENCY OF THE FOLLOWING ACTIVITIES

SPENDING TIME ONLINE

WATCHING TV

IN THEIR OWN WORDS: PRE VS. POST PANDEMIC PARTICIPATION FREQUENCY
I spend more time online since the pandemic started. While I am still getting outside, I do so alone now.

WHAT ACTIVITIES DID NEW OUTDOOR PARTICIPANTS PICK UP DURING COVID?

KEY TAKEAWAY:
Those who participated in an outdoor activity for the first time alone did so close to home and chose an activity with a low barrier to entry (e.g., walking, running, biking, hiking, etc.).

OPPORTUNITY:
How people spend their free time during the pandemic is largely motivated by what is available to do close to home and alone or with others in their household. The pandemic has shown that there is a demand for close-to-home outdoor recreation opportunities.

PERCENT OF NEW PARTICIPANTS REPORTING THAT THEY STARTED OR RESUMED THE FOLLOWING ACTIVITIES SINCE THE ONSET OF THE PANDEMIC

WALKING DURING FREE/ LEISURE TIME	58%
RUNNING/JOGGING OUTSIDE	28%
BICYCLING OUTSIDE	26%
BIRDWATCHING	16%
FISHING	15%
WILDLIFE VIEWING	12%
CAMPING	10%
STAND UP PADDLING	9%
BACKPACKING	8%
CANOEING/KAYAKING/RAFTING	7%
CLIMBING OUTSIDE	7%
SKATEBOARDING	6%
HUNTING	5%
SKIING (OF ANY KIND)	5%
SCUBA DIVING	5%
SURFING	5%
SNOWSHOEING	4%
BOARDSAILING/WINDSURFING	4%
TRIATHLON (OF ANY KIND)	4%
SAILING	3%

IN THEIR OWN WORDS:
PRE VS. POST PANDEMIC PARTICIPATION FREQUENCY
I've started hiking and walking in local parks to get out of the house. I spend too much time inside because of the pandemic and I need the physical activity.

WHAT NON-OUTDOOR ACTIVITIES WERE PARTICIPANTS DOING BEFORE COVID (2019)?

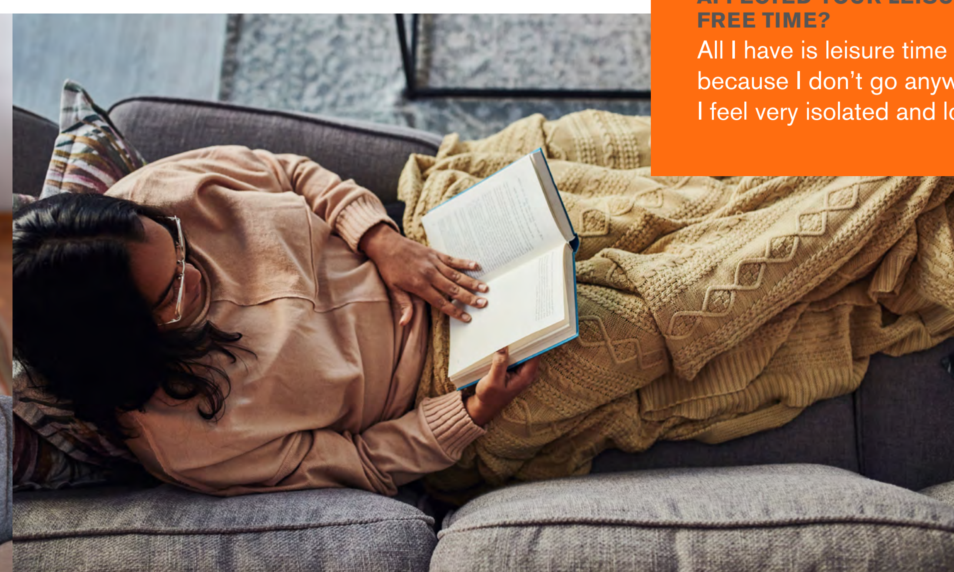
KEY TAKEAWAY:
Prior to the pandemic, new participants were most likely to go out to restaurants, bars, movies, or the theatre and hang out with friends.

OPPORTUNITY:
As pandemic restrictions lift, helping new participants make their outdoor activities more social could help retain higher levels of participation.

PERCENT OF NEW PARTICIPANTS REPORTING THAT THEY DID THESE ACTIVITIES BEFORE THE PANDEMIC

GOING TO RESTAURANTS/BARS	58%
GOING TO THE MOVIES OR THEATRE	52%
HANGING OUT WITH FAMILY/FRIENDS	51%
WATCHING TV	42%
SPENDING TIME ONLINE	42%
GOING TO THE GYM, FITNESS CLUB, ETC.	38%
READING	36%
IN-PERSON FITNESS CLASSES	28%
FITNESS ACTIVITIES AT HOME	27%
PLAYING TEAM SPORTS	22%
ONLINE FITNESS CLASSES	17%

IN THEIR OWN WORDS: HOW HAS THE PANDEMIC AFFECTED YOUR LEISURE/ FREE TIME?
All I have is leisure time because I don't go anywhere. I feel very isolated and lonely.



WHY DID NEW PARTICIPANTS START OR RESUME OUTDOOR ACTIVITIES DURING COVID?

KEY TAKEAWAY:
Getting exercise, staying healthy, and getting out of the house are the top reasons new participants took up outdoor activities. About 40 percent took up new outdoor activities to spend time with others.

OPPORTUNITY:
Promoting outdoor activities as safe and fun ways to spend time with friends and family could lead to stronger retention among new participants.

GET SOME EXERCISE
62%

STAY HEALTHY
62%

GET OUT OF THE HOUSE
62%

GET OR MAINTAIN FITNESS
57%

FOR SOMETHING FUN TO DO
53%

SPEND TIME OUTSIDE/CONNECT WITH NATURE
51%

MANAGE STRESS
50%

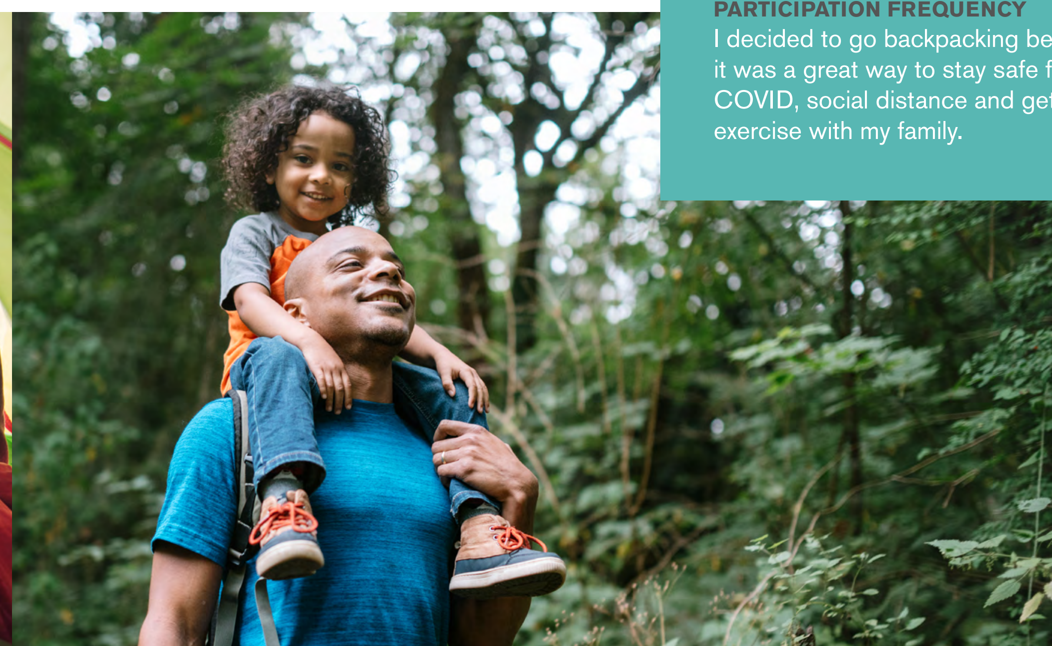
I HAVE MORE FREE TIME
47%

SPEND TIME WITH FAMILY
44%

SPEND TIME WITH FRIENDS
36%

I HAVE MONEY TO SPEND ON THESE ACTIVITIES
28%

% SELECTION AS A MOTIVATION



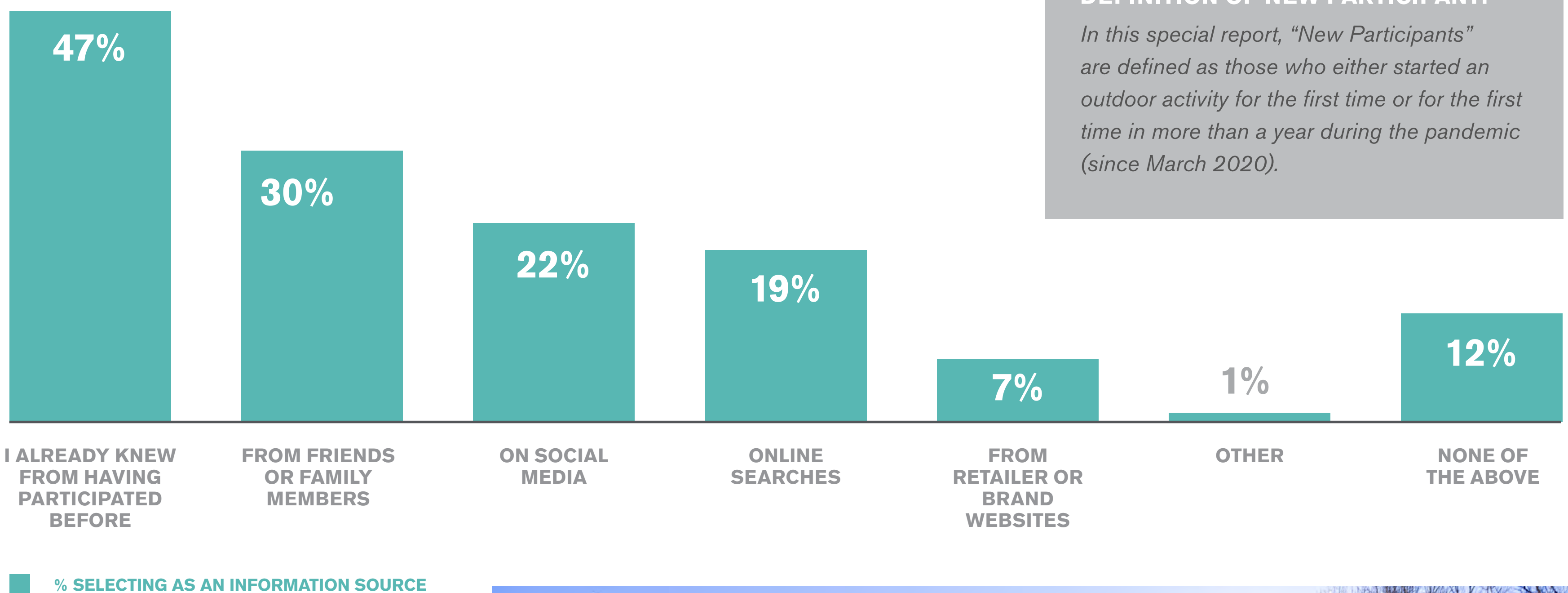
IN THEIR OWN WORDS:
PRE VS. POST PANDEMIC PARTICIPATION FREQUENCY
I decided to go backpacking because it was a great way to stay safe from COVID, social distance and get some exercise with my family.

HOW DID NEW OUTDOOR PARTICIPANTS LEARN ABOUT ACTIVITIES DURING COVID?

KEY TAKEAWAY:
Nearly half of new participants reported that they had prior experience with their new outdoor activity. Almost one-third learned about their new outdoor activity from friends and/or family.

OPPORTUNITY:
Investing in programming that engages families in the outdoors will increase participation.

DEFINITION OF NEW PARTICIPANT:
In this special report, "New Participants" are defined as those who either started an outdoor activity for the first time or for the first time in more than a year during the pandemic (since March 2020).



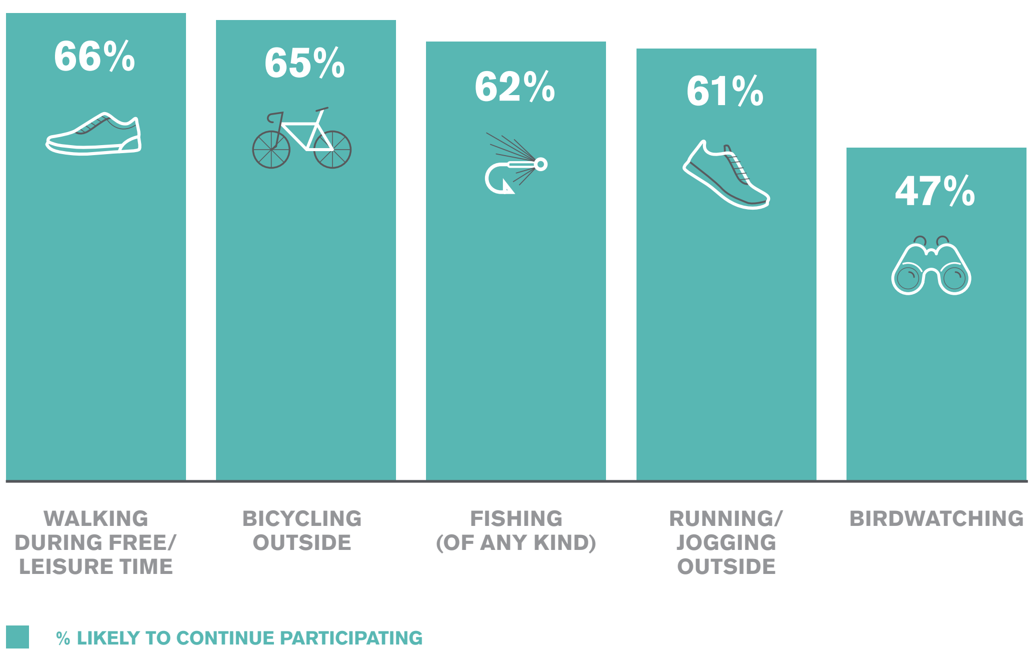
IN THEIR OWN WORDS: PRE VS. POST PANDEMIC PARTICIPATION FREQUENCY
I wanted to get outdoors and do something different. My boyfriend's brother is a huge fisherman and offered to take me with him a few times just to switch up activities and get outdoors.

HOW LIKELY ARE NEW PARTICIPANTS TO CONTINUE THEIR OUTDOOR ACTIVITIES AFTER THE PANDEMIC?

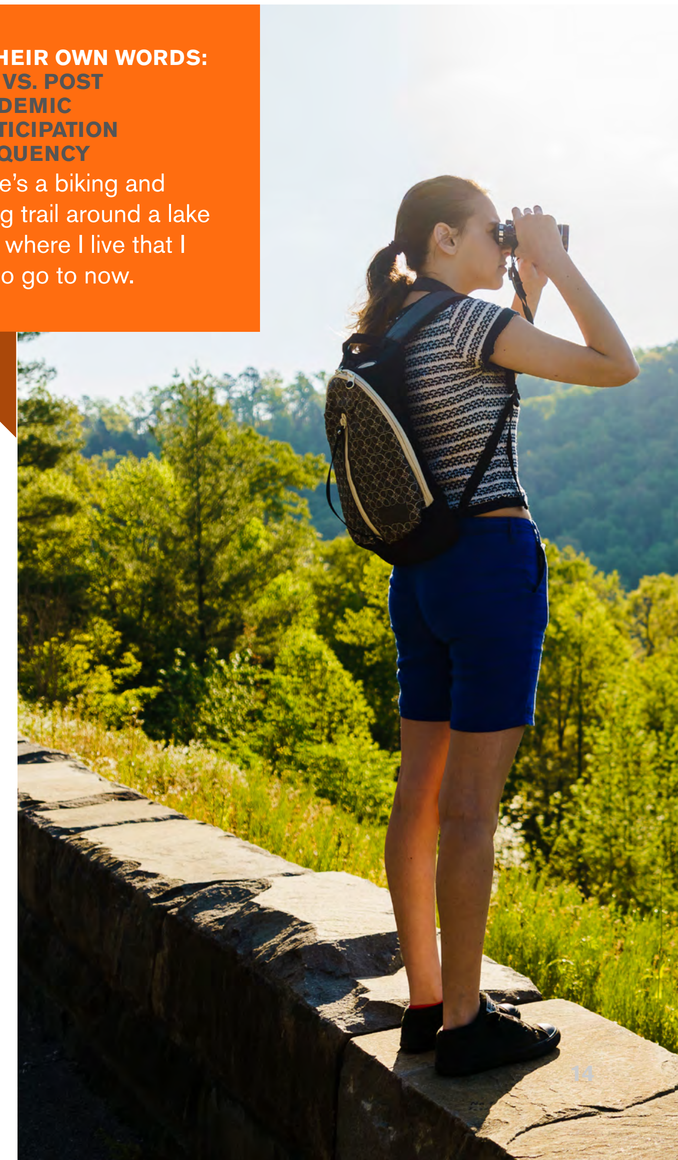
KEY TAKEAWAY:
New participants report a strong intent to continue their outdoor pursuits. About one-quarter of participants say they don't want to continue their new outdoor activities. The top barriers to continuation include travel, resuming other activities, and family demands.

OPPORTUNITY:
The following social media content would be most likely to help encourage continued outdoor participation:

- Information about close-to-home places to recreate
- Information and training about outdoor activities
- Networking and connection opportunities to find others with whom to participate



IN THEIR OWN WORDS: PRE VS. POST PANDEMIC PARTICIPATION FREQUENCY
There's a biking and hiking trail around a lake near where I live that I like to go to now.



WHICH ACTIVITIES HAVE NEW PARTICIPANTS STOPPED DURING THE PANDEMIC AND WHICH WILL THEY RESUME WHEN RESTRICTIONS LIFT?

KEY TAKEAWAY:
New participants have stopped going out to the movies, theatre, restaurants, and bars since the onset of the pandemic

OPPORTUNITY:
Understanding what new participants have stopped participating in helps identify what future competitor activities will be. There is an opportunity to develop marketing that position the outdoors as an attractive alternative to these activities.

WHICH ACTIVITIES DID PARTICIPANTS STOP DURING THE PANDEMIC?

GOING TO THE MOVIES OR THEATRE
50%

GOING TO RESTAURANTS/BARS
46%

GOING TO THE GYM, FITNESS CLUB, ETC.
34%

HANGING OUT WITH FAMILY OR FRIENDS
34%

IN-PERSON FITNESS CLASSES
27%

PLAYING TEAM SPORTS
20%

FITNESS ACTIVITIES AT HOME
15%

ONLINE FITNESS CLASSES
12%

READING
10%

SPENDING TIME ONLINE
8%

WATCHING TV
8%

WHY DID PARTICIPANTS STOP THEIR MOST FREQUENT PRE-PANDEMIC ACTIVITIES DURING COVID?

THE PLACES TO DO THESE ACTIVITIES ARE CLOSED
52%

IT ISN'T POSSIBLE TO DO THESE ACTIVITIES AT AN ACCEPTABLE SOCIAL DISTANCE
46%

IT ISN'T FUN TO DO THESE ACTIVITIES AT AN ACCEPTABLE SOCIAL DISTANCE
39%

HEALTH OR PHYSICAL LIMITATIONS
24%

I DON'T HAVE MONEY TO SPEND ON THESE ACTIVITIES
21%

I DON'T HAVE ANYONE TO PARTICIPATE WITH
20%

WHICH ACTIVITIES WILL PARTICIPANTS RESUME WHEN COVID RESTRICTIONS ARE LIFTED?

HANGING OUT WITH FAMILY OR FRIENDS
75%

GOING TO RESTAURANTS/BARS
57%

GOING TO THE GYM, FITNESS CLUB, ETC.
51%

IN-PERSON FITNESS CLASSES
51%

GOING TO THE MOVIES OR THEATRE
49%

PLAYING TEAM SPORTS
42%

DEMOGRAPHICS AND PSYCHOGRAPHICS

NEW PARTICIPANT PROFILE: DEMOGRAPHICS

COMPARED TO EXISTING PARTICIPANTS, NEW OUTDOOR PARTICIPANTS ARE…

MORE LIKELY TO BE FEMALE*
58% vs. 49%

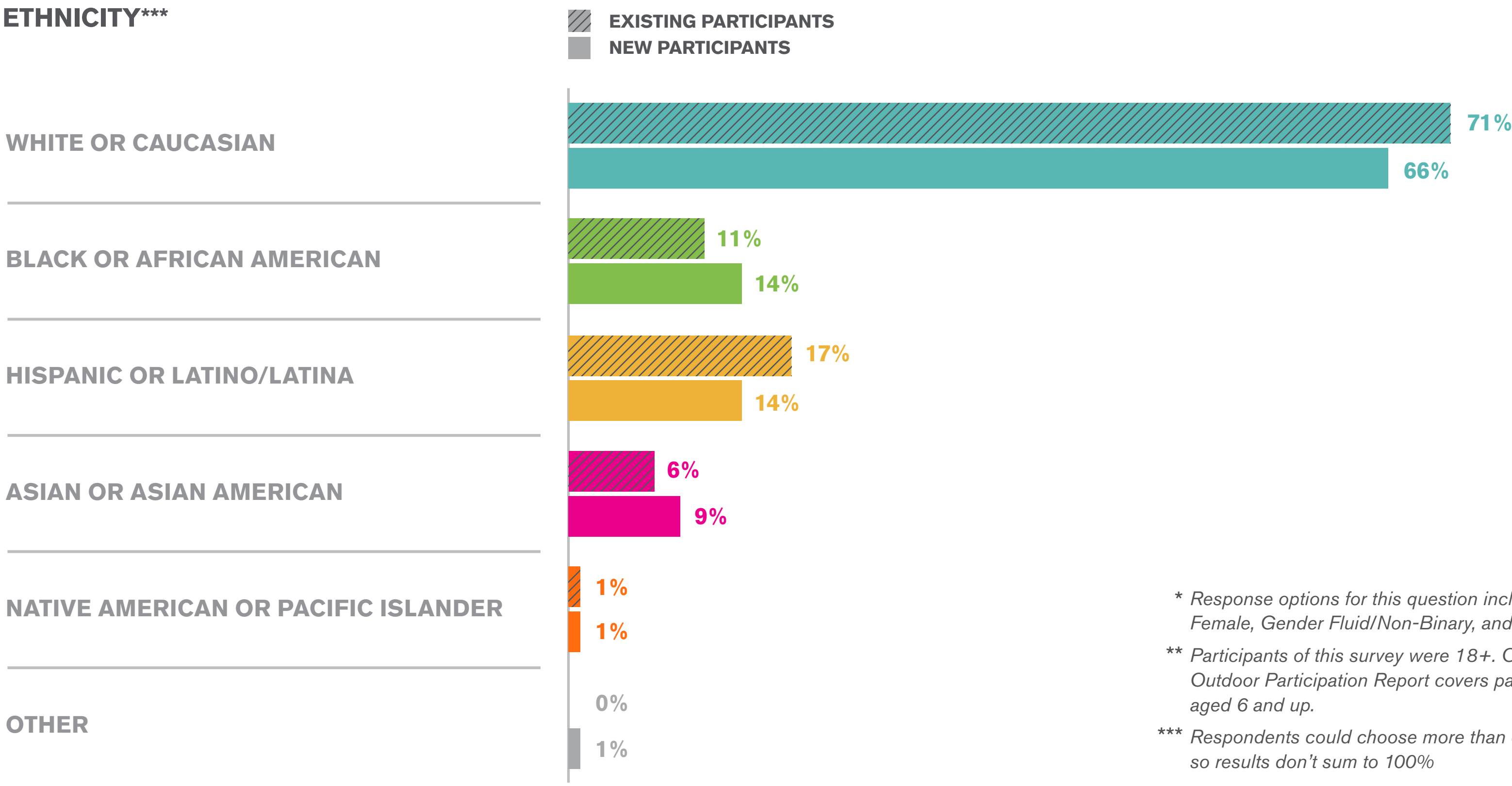
YOUNGER**
average age is 45 vs. 54

SLIGHTLY MORE ETHNICALLY DIVERSE
66% white vs. 71%

MORE LIKELY TO LIVE IN URBAN AREAS
36% vs. 29%

IN A SLIGHTLY LOWER INCOME BRACKET
41% with income of $100K+ vs. 46%

ETHNICITY***



* *Response options for this question included: Male, Female, Gender Fluid/Non-Binary, and Other*

** *Participants of this survey were 18+. Our annual Outdoor Participation Report covers participants aged 6 and up.*

*** *Respondents could choose more than one option so results don't sum to 100%*

NEW PARTICIPANT PROFILE: DEMOGRAPHICS

NEW PARTICIPANTS
EXISTING PARTICIPANTS

AGE

	NEW PARTICIPANTS	EXISTING PARTICIPANTS
50+	30%	52%
18 TO 49	70%	48%

GENDER

	NEW PARTICIPANTS	EXISTING PARTICIPANTS
FEMALE	58%	49%
MALE	42%	51%

HOUSEHOLD INCOME

	NEW PARTICIPANTS	EXISTING PARTICIPANTS
< $60,000	34%	32%
$60,000 to < $100,000	25%	23%
$100,000 OR MORE	41%	46%

REGION

	NEW PARTICIPANTS	EXISTING PARTICIPANTS
WEST	25%	24%
NORTHEAST	18%	18%
MIDWEST	20%	22%
SOUTH	37%	36%

NEIGHBORHOOD

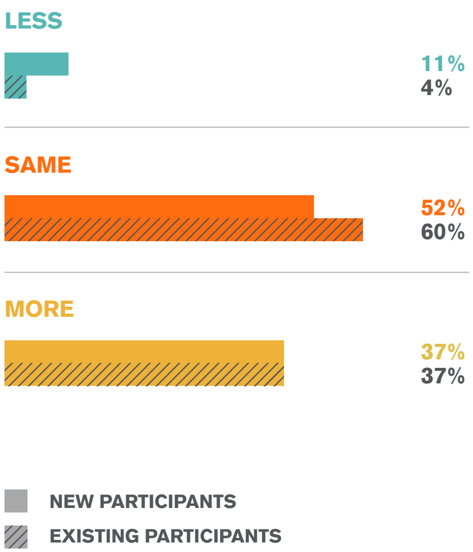
	NEW PARTICIPANTS	EXISTING PARTICIPANTS
SMALL TOWN	5%	7%
RURAL	11%	9%
URBAN	36%	29%
SUBURBAN	48%	55%

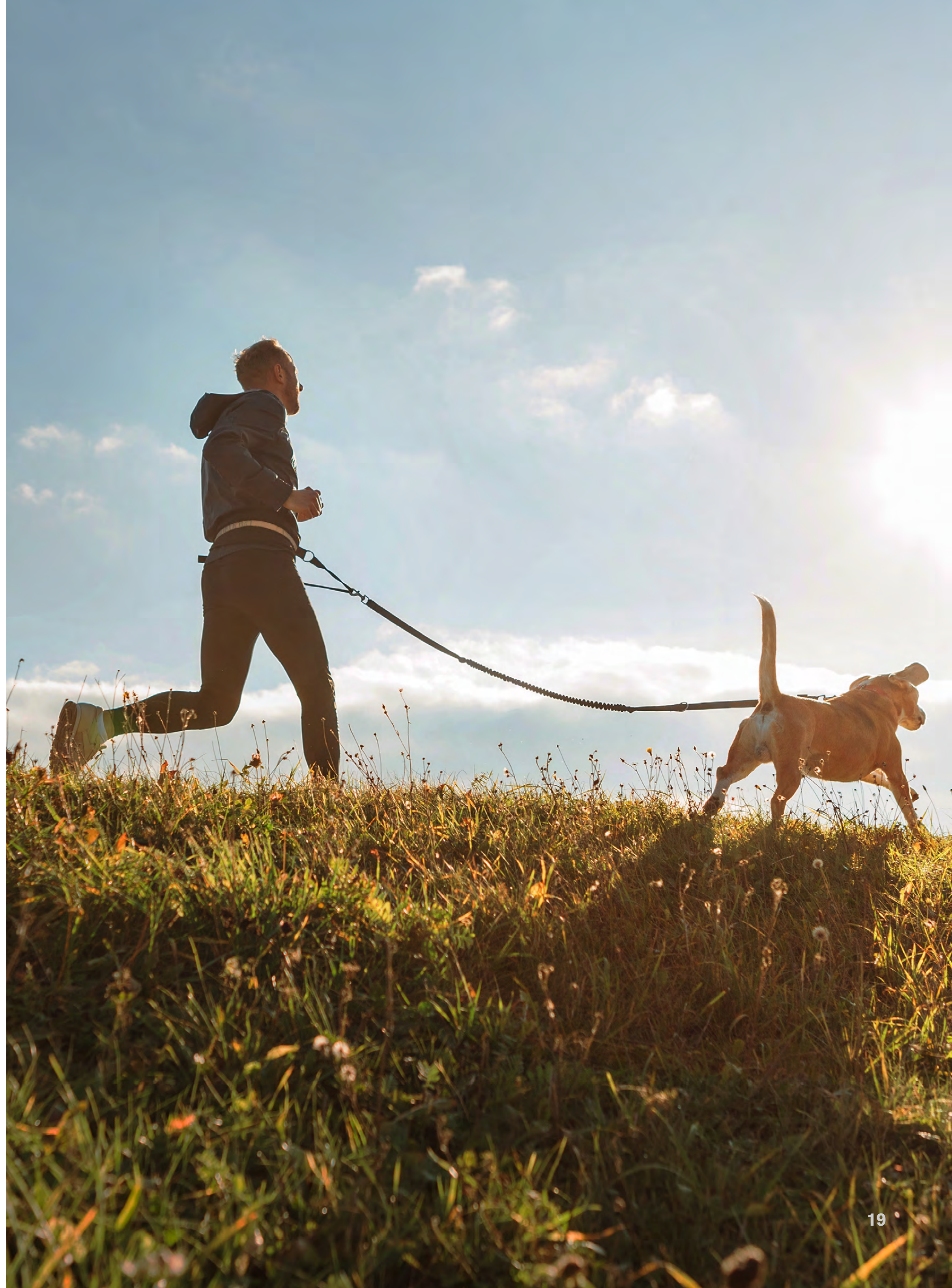
NEW PARTICIPANT PROFILE: EFFECTS OF THE PANDEMIC

KEY TAKEAWAY:
New outdoor participants are likely to report having more free time as a result of the pandemic, however they are almost equally split between having no change in working life and working from home.

OPPORTUNITY:
Promoting close-to-home outdoor participation could lead to increased retention of new participants when their amount of free time is reduced post-pandemic.

HOW MUCH LEISURE TIME DO PARTICIPANTS HAVE DURING THE PANDEMIC?





METHODOLOGY

METHODOLOGY

To meet project objectives, NAXION conducted a 10-minute online survey in December 2020. The survey was fielded to an online panel demographically representative of U.S. adults 18 and older. To qualify for the study, respondents must have met one of the following criteria:

- Engaged in outdoor activities for the first time or for the first time in more than a year since the onset of the COVID-19 pandemic (new participants)
- Participated in outdoor activities before the pandemic (existing participants)

OUTDOOR ACTIVITIES INCLUDED:

- Backpacking
- Bicycling outside
- Birdwatching *(more than 1/4 of a mile from home/vehicle)*
- Boardsailing/windsurfing
- Camping
- Canoeing/kayaking/rafting
- Climbing outside *(not including a climbing gym)*
- Fishing *(of any kind)*
- Hunting *(of any kind)*
- Running/jogging outside
- Sailing
- Scuba diving
- Skateboarding
- Skiing *(of any kind)*
- Snowshoeing
- Stand up paddling
- Surfing
- Triathlon *(of any kind/xterra/adventure racing)*
- Wildlife viewing *(more than a 1/4 mile from home/vehicle)*
- Walking during free/leisure time *(not to get from one place to another)*

DEFINITION OF NEW PARTICIPANT:

In this special report, "New Participants" are defined as those who either started an outdoor activity for the first time or for the first time in more than a year during the pandemic (since March 2020).

QUOTAS WERE SET AS FOLLOWS:

- New participants: 300 *(maximum of 50 who participated in only walking)*
- Existing participants: 300 *(maximum of 50 who participated in only walking)*

A TOTAL OF 613 U.S. ADULTS AGES 18+ COMPLETED THE SURVEY, PROVIDING AN OVERALL MARGIN OF ERROR +/- 5% AT A 95% LEVEL OF CONFIDENCE.

The sample was weighted to represent the U.S. population ages 18 and older for gender, ethnicity, age, household income, and region. Weighting took place over three steps:

- All respondents who completed the screener and passed quality control questions were weighted to represent the U.S. population for gender, ethnicity, age, household income, and region (regardless of whether they qualified or were over quota for the study)
- Because the distribution of gender, ethnicity, age, household income, and region in the eligible population are unknown, the weighted screeners were used to create weighting targets that represent the eligible population (new participants and existing participants) on those demographic dimensions. To account for quotas set in the sampling plan, a weighting target was calculated for those who qualified based only on walking vs. those who qualified for participating in other activities.
- Respondents who completed the study were weighted to represent the eligible population for gender, ethnicity, age, household income, region, and walking only/other activities.

Unless otherwise noted, all analyses presented in this report are weighted and all charts represent new participants.

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